



QUOTA ADJUSTMENTS

Change Record:

Change Date: 05/23/2012	Changed by: D Childrey
Changes:	<p>Business Process Procedure Overview</p> <ul style="list-style-type: none"> Par 1/last sentence: Text Change <u>From:</u> <i>The Quota Adjustments infotype (2013)...</i> <u>To:</u> <i>The Quota Corrections infotype (2013)...</i> Last Par/1st bullet: Text Change <u>From:</u> <i>Select the effective date and ending date of the personnel action</i> <u>To:</u> <i>Select the effective date of the quota adjustment</i> <p>Step 14-17:</p> <ul style="list-style-type: none"> New steps re: Adding comments to the Infotype <p>Additional Resources</p> <ul style="list-style-type: none"> Additional BPPs listed

Trigger:

There is a need to manually manage adjustments to an employee's quotas.

Business Process Procedure Overview:

The HR/Payroll system automatically manages an employee's accruals of various quotas, including Sick, Vacation, Community Service and Military leave (if applicable). The HR/Payroll system will also systematically manage deductions to these quotas. There are only a few special circumstances that require manual adjustments to an employee's quota balances. The Quota Corrections infotype (2013) is used to manage adjustments to an employee's quotas.

The following scenarios require manual quota adjustments via IT2013:

- An employee who designates his or her Community Service Leave for tutoring at the beginning of the calendar year should have their quota 65 balance of 24 hours reduced to zero and be given 36 hours of Community Service Leave- Tutoring in quota 66.
- An employee that is a member of the military reserve that joins the State after 10/1 accrual date of Military Leave (Training) may need his or her quota created with a IT2013 record if the reservist status is not known at the time of hire.
- An employee requesting and being approved for Advanced Vacation or Advanced Sick Leave - The advanced leave process is detailed in the BPP instructions: *PA61 - Advanced Leave*.
- Returning unused Voluntary Shared Leave to the donor should be done with a quota correction record.

- A valid discrepancy has been found in an employee's quota - Upon management approval, the quota should be adjusted as necessary.

All subtypes of IT2013 are relevant for quota adjustments.

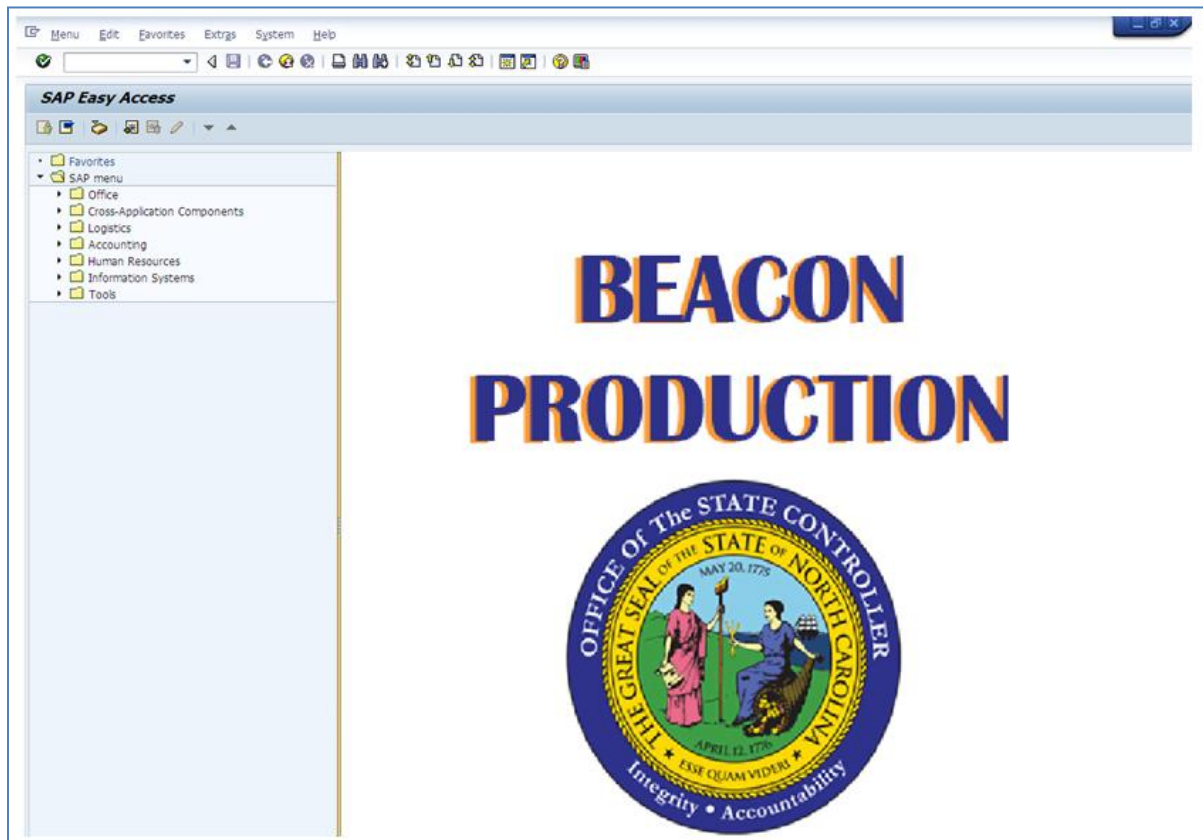
In this BPP you will learn to:

- • Select the effective date of the quota adjustment
- • Provide the number of hours to be added or removed
- • Choose from two selections for an increase or decrease adjustment to an employee quota
- • Adjust a quota balance

Access Transaction:

Via Menu Path:	SAP menu >> Human Resources >> Time Management >> Administration >> Time Data >> PA61 – Maintain
Via Transaction Code:	PA61


PROCEDURE



1. Update the following field:

Field Name	Description	Values
Command	White alphanumeric box in upper left corner used to input transaction codes	Enter value in Command. Example: PA61

2. Click the **Enter**  button.



Information

You may want to enter this transaction code in your Favorites folder.

- Choose Favorites > Insert Favorites
- Type in PA61
- Click Enter.

To see the transaction code displayed in front of the link in your favorites:

- Choose Edit > Settings
- Place a check next to Display Technical Name
- Click Enter

3. Update the following field:

Field Name	Description	Values
Personnel no.	Unique employee identifier	Enter value in Personnel no. Example: 93000512

4. Click the **Enter**  button.

NOTE: : Be sure to check that the correct personnel number was entered after clicking Enter.

5. Update the following fields:

Field Name	Description	Values
From	Start date of the quota correction to be processed.	Enter value in From. Example: 10/1/07
To	Ending date	Enter value in To. Example: 10/4/07
Infotype	Unique number identifying the type of data to be displayed.	Enter value in Infotype. Example: 2013

6. Click the **Enter**  button.

Only the From Date is used on IT2013 records. This value can also be entered once the infotype record screen is displayed.

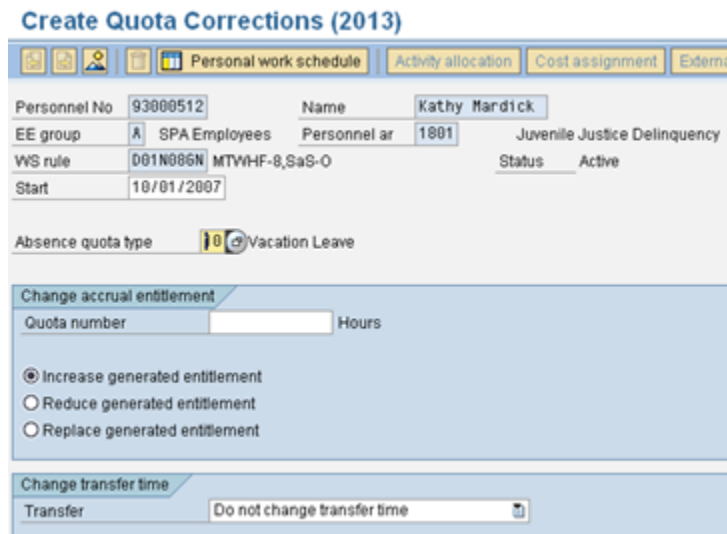
Only one IT2013 record should be created for each subtype for the same From date. Multiple records can cause Time Evaluation to error out for the employee.

7. Update the following field:

Field Name	Description	Values
Sty	Infotype subtype.	Enter value in STy. Example: 10

Enter the subtype corresponding to the quota for adjustment. Select the STy field matchcode to view a list of available quotas. In the example provided, the employee's Vacation quota (subtype 10) is selected to manage the employee's additional vacation entitlement.

8. Click the **Create (F5)**  button.



9. Update the following field:

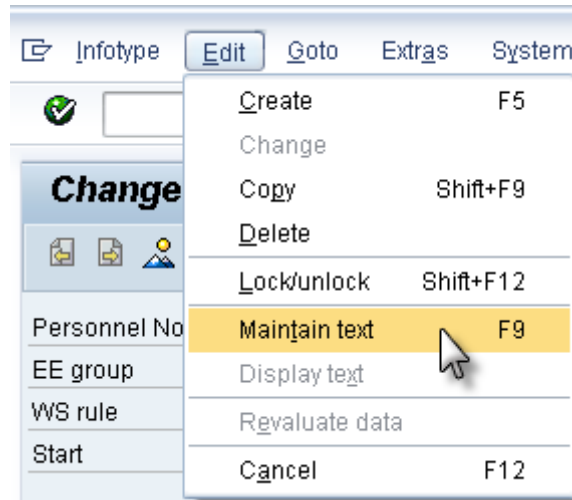
Field Name	Description	Values
Quota number	The number of hours to be added or removed.	Enter value in Quota number. Example: 10

10. Click the **Enter**  button.

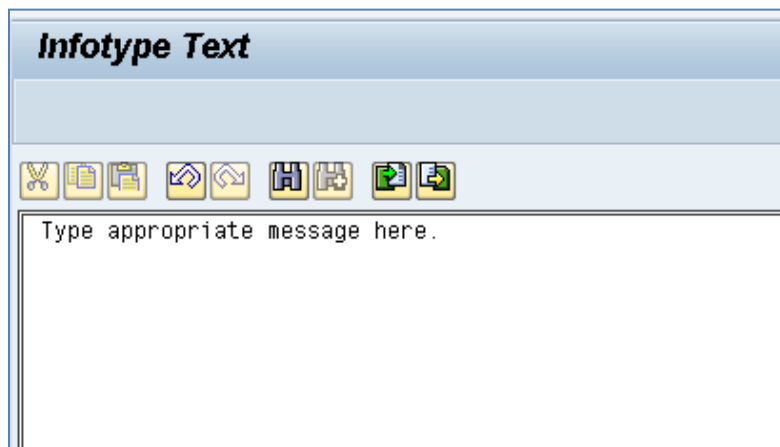
11. Select one of the first two radio button options:


Increase generated entitlement	Indicates that hours should be added to quota (default option)	This option adds the hours specified to the employee's existing quota or creates the quota with the specified hours if the employee does not have a current balance for the selected quota.
Decrease generated entitlement	Indicates that hours should be subtracted from quota	This option subtracts the hours specified from the employee's existing quota.
Replace generated entitlement	DO NOT SELECT THIS OPTION!	DO NOT USE THIS OPTION! This option was intended to replace the employee's quota accrual generated in Time Evaluation on the From Date. The HR/Payroll system staff advises against trying to use this option.

12. Click **Transfer** from the drop-down menu.
13. Select the third option; **Only transfer quota correction immediately** from the list box. **DO NOT USE THE OTHER OPTIONS.**
14. On the toolbar at the top of the screen, click **Edit > Maintain text**.




15. Type an appropriate message for the record.




16. Click the **Save (Ctrl+S)**  button to save the text to the record.

The Maintain Text icon  will display on the infotype.

17. Click the **Save (Ctrl+S)**  button to save the Quota Correction record.

The Quota Correction record will be processed during the nightly Time Evaluation process. The adjusted quota should then be reflected in the employee's quota balances the following day. To verify the adjustment processed correctly, access Quota Overview (transaction PT50) and view the employee's quota balances as detailed in PT50 transaction. For more detailed instructions for transaction PT50, refer to the BPP instructions: *PT50 - Quota Overview*.

18. Click the **Back (F3)**  button.

19. The system task is complete.

ADDITIONAL RESOURCES

Training HELP website: <http://www.osc.nc.gov/training/osctd/help/>

Other BPPs	PA61 – Advanced Leave <i>Training HELP website > Time Management > BPPs</i>
	PT50 – Quota Overview <i>Training HELP website > Time Management > BPPsfa</i>